



A FourSquare Market Study

**Master Plan for a New
YMCA Community Center
Serving District 6 of the
City of San Antonio**

Presented to the
YMCA of Greater San Antonio

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Submitted by



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Market Research and Strategic Planning for Non-profits Nationwide

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Chapter 1

Executive Summary

Executive Summary

In order to assess opportunities for a new YMCA community center serving District 6 of the City of San Antonio, FourSquare Research conducted both qualitative and quantitative research. This included in-depth telephone interviews with over 600 randomly-selected households that live in the targeted survey area but do not belong to any YMCA. Based on the findings of the study, the Consultant offers the following key conclusions and recommendations:

1. The study revealed **moderate interest exists** for a new YMCA community center serving District 6. A total of **4.0%** of all households expressed *a great deal of interest* in joining a new YMCA with various location, pricing, and facility options, just below the national average at 4.5%.
2. Findings indicated **the location at the corner of Potranco and Highway 151 works**, as 86% of prospective members considered it *very convenient*.
3. Based on the percentage of households with *a great deal of interest*, the study forecast **2,699** new membership units and **\$1,606,769** in membership revenue during the first 12–18 months of a new YMCA community center at the lower, current branch rates of the Westside YMCA. Findings also revealed an usually high number of households with *a lot of interest* waiting in the wing.
4. Findings revealed the community characteristics include an **inactive population, lack of providers from the public sector, a growing population, and relatively moderate awareness of the YMCA**. These characteristics would create opportunities and challenges for the new YMCA.
5. Findings reveal **the current YMCA membership rates at the Westside YMCA work** as 80% of prospective expressed interest.
6. The study revealed the **primary prospective member groups** of a new YMCA include families with children, aging baby-boomers, and Health-seekers, all of whom require a hand-holding approach and desire for a “Third Place” at the YMCA.
7. If the decision is made to proceed with the building of a new YMCA community center at the proposed location, the Consultant recommends **a facility with approximately 37,000 square feet indoors including an indoor pool**.

The tables on the following pages illustrate summary of forecasts for the total number of households and membership revenue by location, summary of program usage, as well as the space allocation recommended for a new YMCA community center at the proposed location.

Summary of Forecasts

The chart below summarizes the findings of the market research study that forecasts the opportunities for a new YMCA Community Center.



Figure 1.01 Summary of Forecasts for a new YMCA Community Center Serving District 6

Features of a New YMCA Community Center Serving District 6 of the City of San Antonio									
Programs	Fitness Center	Aerobics Studios	Multipurpose Rooms	Indoor Multi-purpose Gymnasium	Indoor Warm-Water Family Pool	Child Watch/ Babysitting	Kids Zone	Youth/ Teen Center	
Adult Fitness	Very High	Very High			Moderate				
Adult Aquatics					High				
Adult Adventure									
Adult Sports									
Adult Recreation		Moderate							
Nutrition and Weight Management			High						
Stress and Relaxation		Very High							
Health Programs			Moderate						
Women's Programs	Moderate								
Family Activities				High	High				
Programs for Children Ages 0–2					Moderate	Moderate			
Programs for Children Ages 3–5		Low	High	Low	Very High	Very High	Very High		
Programs for Children Ages 6–9		Low	Moderate	Low	Very High		Very High		
Programs for Children Ages 10–13	Moderate	Low	Low	Low	High		Low	Low	
Programs for Children Ages 14–17	Moderate	Low	Low	Low	High			Moderate	
Adult Rating Scale	Low	<15%		Children's Rating Scale			Low	<5%	
	Moderate	15%–29%					Moderate	5%–9%	
	High	30%–44%					High	10%–14%	
	Very High	45%+					Very High	15%+	

Figure 1.02 Summary of Usage among Prospective Members of a New YMCA Community Center Serving District 6

Indoor Features Critical in Attracting New Membership Units for a New YMCA Community Center Serving District 6 of the City of San Antonio	Approximate Square Footage	Program Interest Findings
First-class wellness center that includes <ul style="list-style-type: none"> • a cardiovascular area of 4,000 sq. ft. • a free weights and strength-training equipment area of 2,500 sq. ft., including a 30-minute circuit training area • a designated workout area of 250 sq. ft. with more staff supervision for teens, beginners, and women • consulting areas/rooms of 250 sq. ft 	7,000	Figure 7.05, Figure 8.01, Figure 8.03, & Figure 8.04
Two group exercise studios, one 1,500 square feet for aerobics, group fitness classes, and another 1,500 square feet for relaxation, dance, yoga, and tai chi	3,000	Figure 8.02, & Figure 8.04
An indoor warm-water family pool with <ul style="list-style-type: none"> • zero degree/beach entry for recreational swimming, lessons, and water aerobics • aquatic playground features such as splash pads and sprays • two lanes for lap swimming, aqua walking and running • showers, lockers, and changing areas for men, women, and families 	9,000	Figure 7.02, Figure 9.01, & Figure 9.02,
An indoor multipurpose activity center/gymnasium with half courts, dividers, retractable hoops, versatile flooring, and ample storage space for a variety of activities such as basketball, volleyball, gymnastics, summer day camps, and family night.	6,000	Figure 7.02, & Figure 8.04
Multipurpose classrooms, with dividers and a sink/wet area for arts classes, health programs, nutrition seminars, and weight loss programs	500	Figure 7.01, Figure 7.02, Figure 8.02, & Figure 8.04
Child watch/baby-sitting area for children infant–5	1,000	Figure 7.01
A kids play center with high ceiling, moonwalks, climbing mazes and interactive games for children ages 6–9	1,000	Figure 7.01, & Figure 7.02
Youth and teen center with TV, pool tables, Exergame, and seating for social (which can also be used for other programs when needed)	800	Figure 7.05
Members' lounge/snack bar/social area/community program area	1,500	Figure 8.03
Subtotal	29,800	
Minimal planning factor, H/V/AC, bathrooms, halls, and offices (25%)	7,450	
Total Indoor	37,250	

Figure 1.03 Features Critical to the Success of a New YMCA Community Center Serving District 6

Chapter 2

Methodology and Scope

Methodology

This study used the following methodology:

- The **qualitative research** was conducted through discussion with staff members of the YMCA of Greater San Antonio. A market audit on the similar service providers was also conducted at this time. The responses and concerns in the qualitative phase were used toward the development of the survey instrument used in the quantitative phase.
- The **quantitative research** in this study involved in-depth telephone interviews with over 600 randomly-selected households in the targeted survey area that currently do not belong to a YMCA. Interviews were conducted in Spanish as needed. The boundaries of the targeted survey area are defined in the map on page 17.

In addition to random sampling, a quota system was developed to ensure that the number of interviews completed in each census tract was proportionate to the number of households in each census tract. Also, the percentage of interviews with respondents ages 65 and older was controlled to be consistent with the percentage of seniors ages 65 and older in the general population.

All respondents were asked to answer questions for themselves and on behalf of the household when applicable. All interviews were conducted May 16—29, 2011. The methodology used resulted in findings with a 95% confidence level and a statistical error of plus or minus 3.5%.

The recommendations provided in this report are based on this methodology and on the experience of FourSquare Research, Inc., with over 700 similar market research studies with YMCAs nationwide.

Scope

Specific questions addressed included, but were not limited to, the following:

- How can a new YMCA best serve the residents in City of San Antonio District 6?
- What is the demand for a new YMCA(s) in the community? How many households will join a YMCA during the first 12–18 months after it is built?
- What is the potential in revenue generated from new membership units within the first 12–18 months of operation of a new YMCA? Would it be sufficient to support the operation?
- How would prospective members perceive each of the proposed sites?
- Which of the possible sites would attract the highest number of households and generate the most membership revenue?
- Which configuration of facility features for a new YMCA will attract the highest number of membership units?
- What types of new services should be offered to adults of all ages, ranging from cardiovascular, weight management, and exercise programs designed specifically for women, to new aquatic-based orthopedic rehabilitation services?
- What types of new child care services should be offered for children ranging from preschool to after-school programs, summer camps with special new themes, and special fitness and recreation activities for older adolescents and teenagers?
- What are the demographic and psychographic profiles of prospective members of a new YMCA?
- What is the facility's niche in the area?
- What pricing policy would be appealing to prospective members? Would YMCA current membership structure work?
- What opportunities for partnerships are present?

Chapter 3

Defining the Survey Area

Census Tract Map of the Targeted Survey Area

The following map shows the **census tracts** in the targeted survey area.

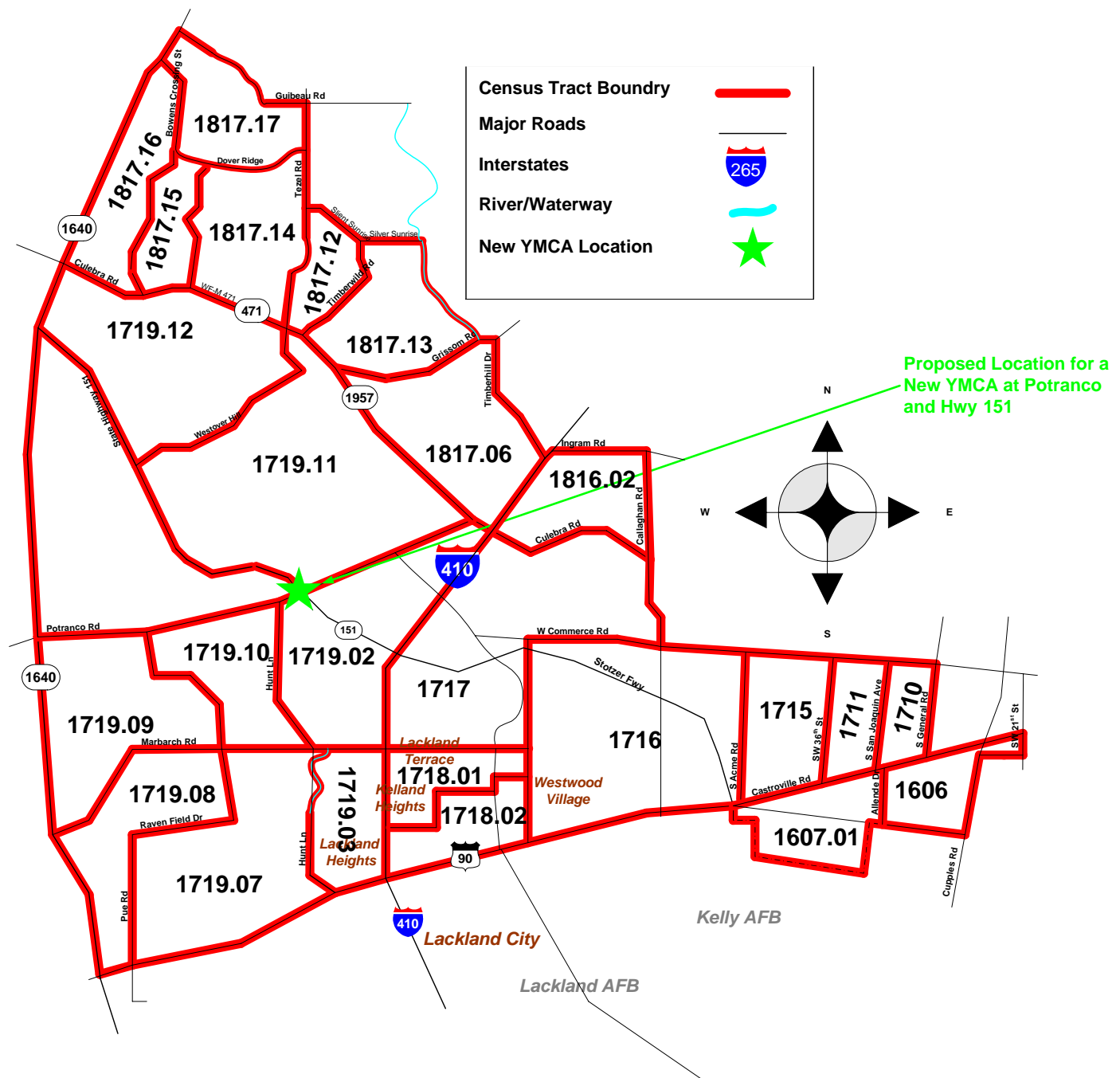


Figure 3.01 Census Tract Map of the Targeted Survey Area

Demographic and Population Trends Analysis of the Area Targeted for the Survey, 2000–2015

The tables on this and the following page detail the **population trends** in the targeted survey area for the years 2000–2015. This information is provided by the United States Census Bureau.

Summary of Demographics

1. Residential growth four times the national average
2. Percentage of households with children well above the national average
3. Percentage of adults 65 or older below the national average
4. Median household income well below the national average
5. Percentage of households with total annual household income less than \$35,000 and less than \$50,000 above the national average
6. Percentage of households owned by occupants close to the national average and rentals above the national average, pointing to a stable and growing community

	2000 Census	2010 Estimates	2015 Projections	2010 Nat'l. Average
Total Population	160,354	193,509	218,455	4%
Total Households	51,109	60,123 12% increase from 2010–2015	① 67,493	3%
Total Population By Race				
White	62%	84%	82%	74%
African American	8%	84%	10%	12%
American Indian	1%	1%	1%	1%
Asian	2%	3%	3%	5%
Other/Multi-Races	27%	2%	3%	8%
Hispanic Origin	64%	68%	69%	16%
Total Population By Gender				
Male	48%	49%	49%	49%
Female	52%	51%	51%	51%
Household				
Average Household Size	3.17	3.28	3.35	2.61
Percentage of Family Household	80%	73%	70%	67%

Continued on next page

* Hispanic origin can be any race.

NOTE: These figures are double-checked using DemographicsNow.com.

Copyright Market Statistics, Inc. 2010

Defining the Survey Area

Household Growth Trends by Census Tract, 2010–2015

The following table gives the **household growth trends and median household income by census tract** in the area targeted for the survey for the years 2010–2015.

Census Tract	2010 Estimate	2015 Projection	% of change 10-15	2010 Median Income
1606.00	1,364	1,269	-7%	\$27,220
1607.01	915	858	-6%	\$28,103
1710.00	1,537	1,430	-7%	\$22,844
1711.00	1,097	1,017	-7%	\$22,243
1715.00	2,142	2,042	-5%	\$26,594
1716.00	1,958	2,031	4%	\$24,671
1717.00	2,364	2,368	0%	\$38,209
1718.01	1,761	1,637	-7%	\$30,797
1718.02	2,040	1,916	-6%	\$26,703
1719.02	2,758	5,303	92%	\$32,928
1719.03	2,233	3,423	53%	\$35,213
1719.07	3,127	5,103	63%	\$48,353
1719.08	2,740	2,973	9%	\$46,697
1719.09	2,581	3,423	33%	\$55,427
1719.10	2,947	2,878	-2%	\$52,150
1719.11	7,398	8,238	11%	\$59,289
1719.12	1,707	2,045	20%	\$53,485
1816.02	1,576	1,971	25%	\$36,211
1817.06	3,238	3,288	2%	\$39,120
1817.12	1,179	1,110	-6%	\$65,180
1817.13	2,357	2,423	3%	\$59,263
1817.14	3,927	3,899	-1%	\$64,852
1817.15	2,061	1,972	-4%	\$48,039
1817.16	2,352	2,280	-3%	\$45,696
1817.17	2,764	2,596	-6%	\$63,301
Totals/ averages	60,123	67,493	12%	\$39,120

Figure 3.03 Household Growth Trends by Census Tract

Chapter 4

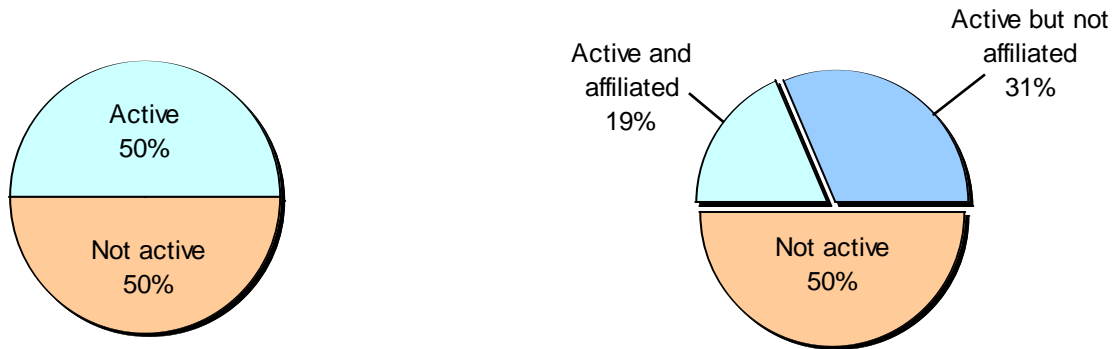
Findings among Area Residents

This data helps define

- Current physical activity level of the general population
- Presence of similar providers in the marketplace

Area Residents' Activities and Affiliations

The left column shows the percentage of residents currently involved in **physical or recreational activities** and lists the **top activities**. The right column shows the percentage of residents who currently **belong to or are affiliated with a public or private health, fitness, or recreational facility**, while the table lists the **top options**.



Top Fitness and Recreation Activities* (percentage of respondents/multiple responses)

Walking/running	24%
Swimming	14%
Workout equip/weights	13%
Various exercise	5%
Aerobics	4%
Basketball	4%
Soccer	4%
Hiking/camping	4%
Working in yard/garden	3%
Cycling	3%
Baeball/softball	2%
Yoga/stretching/toning	2%

Top Health, Fitness and Recreation Options* (percentage of respondents/multiple responses)

For profit providers	9%
Curves	
Gold's Gym	
Bally's	
Snap Fitness	
Planet Fitness	
Spectrum	
Work/home/school	8%
Own equipment/work out at home	
At work or school	
Apartment/complex	
Other Nonprofit Providers	2%
Area parks and recreation	

Active refers to those area residents who said they were currently involved in physical or recreational activities. *Not active* refers to those who said they weren't currently involved in physical or recreational activities.

Figure 4.01 Residents' Fitness Activities and Affiliations

Awareness of the YMCA among Area Residents

The chart on the left shows the **level of awareness of the YMCA** among area residents. The chart on the right shows which ones they were aware of.

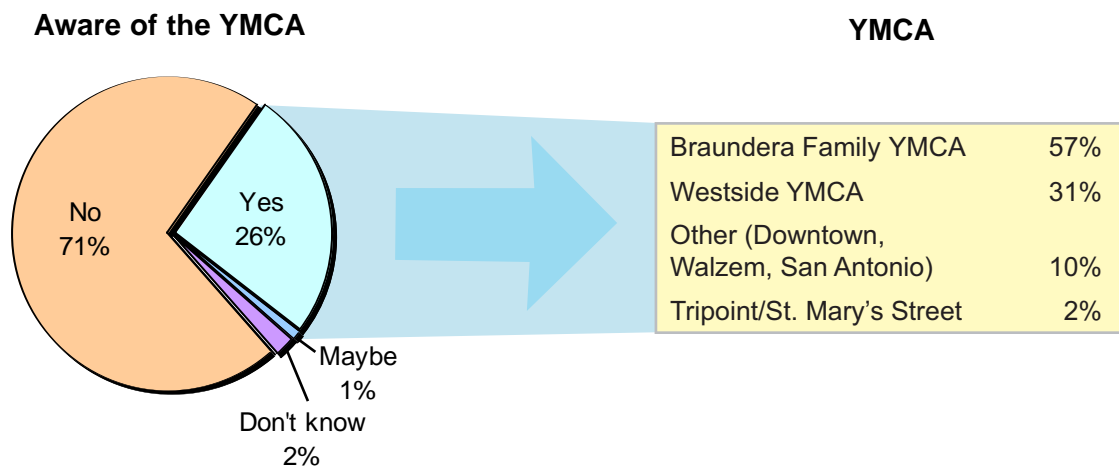


Figure 4.02 Awareness of the YMCA among Area Residents

Image of the YMCA among Area Residents

The following graph shows how **area residents would characterize the YMCA**.

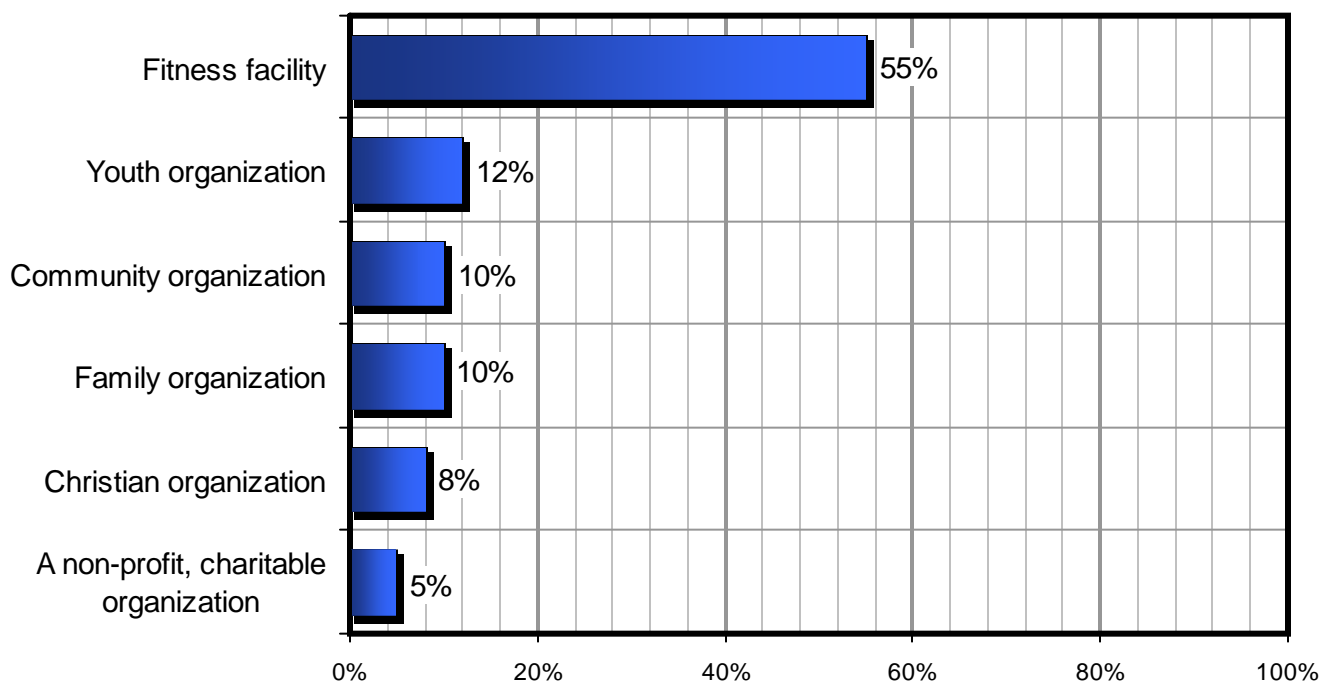


Figure 4.03 Image of the YMCA among Area Residents

Chapter 5

Membership Projections

This data can be used to

- Determine how many households will join
- Develop a pricing strategy
- Plan budgets based on membership and revenue forecasts

Overview

To determine the demand for a new YMCA Community Center serving District 6 of the City of San Antonio, FourSquare Research conducted telephone interviews with 658 households in the targeted survey area. Among all households randomly selected, 600 households were taken through the in-depth interview. Fifty-eight (58) households refused to participate in the in-depth interview for various reasons.

Interview participants were asked a variety of questions to determine their level of interest and their preferences regarding pricing, facility features, and location. Based on their answers, the Consultant was able to forecast membership and revenue levels.

Location

The survey of area residents was designed to test the level of interest in joining a new YMCA Community Center located *at the corner of Potranco and Highway 151*.

The pie chart below illustrates the perceived level of convenience of the proposed location among prospective members of the new YMCA Community Center serving District 6.

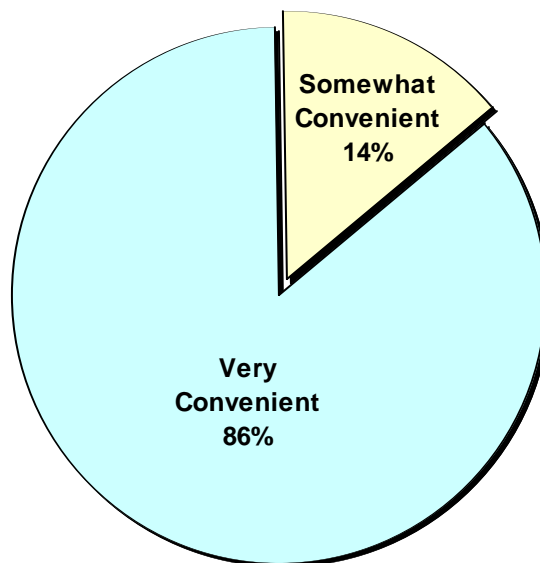


Figure 5.01 Convenience of Proposed Location among Prospective Members

Facility Features

The following table details the facilities, programs, and services included as part of membership.

Features Include:
<ul style="list-style-type: none">• a first-class fitness center with cardiovascular and muscle-strengthening equipment
<ul style="list-style-type: none">• an indoor multipurpose gymnasium for a variety of indoor sports and recreational programs
<ul style="list-style-type: none">• studios with free aerobics and group exercise classes
<ul style="list-style-type: none">• a variety of health programs
<ul style="list-style-type: none">• programs for school-age children such as fitness classes, sports and recreation, help with homework, healthy-eating classes, and arts and crafts
<ul style="list-style-type: none">• babysitting while parents work out
Additional Facility Feature Tested to Determine Additional Interest in Joining
<ul style="list-style-type: none">• an indoor warm-water pool for recreational swimming, swim lessons, and water aerobics

Figure 5.02 Facility Features

Pricing Options

The following table details the pricing options quoted for each membership category. Respondents were quoted monthly membership rates and joining fees based on their preference for a particular membership category defined below.

The rates in

- **green** represent the **higher, current branch rates at the Braundera YMCA**
- **pink** represent the **lower, current branch rates at the Westside YMCA**

Membership Category	Monthly Rates	One-Time Joining Fees
Student under Age 18 Enrolled in College or a Full-Time College Student Over Age 18	\$37 • \$31	\$99
Individual Adult Age s 18–61	\$55 • \$40	\$99
Senior Age 62 or Over	\$48 • \$31	\$99
Adult Couple	\$72 • \$50	\$99
Single-Parent Family	\$72 • \$50	\$99
Family	\$87 • \$55	\$99

Figure 5.03 Pricing Options

Determining the Number of Households to be Used in Forecasting

To determine the number of households to be used in forecasting, we subtract the number of households that currently belong to a YMCA from the projected number of households in the area for the year 2015 (Figure 5.04 below).

Projected Number of Households in the Area for Year 2015 67,493*	—	Number of Households that Belong to a YMCA n/a	=	Total Number of Households 67,493
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Figure 5.04 Formula for Calculating the Total Number of Households

The study findings did not indicate any households in the targeted survey area that already belong to a YMCA. Therefore, the **total number of households** in the survey area that will be used in forecasting is **67,493**.

Given the percentage of households with *a great deal of interest* in an annual membership, we can determine the number of households in the targeted survey area with the highest level of interest in an annual membership. We use the following formula (Figure 5.05 below) to forecast the number of households with *a great deal of interest*.

% of Respondents with A Great Deal of Interest	x	Total Number of Households	=	Number of Households with A Great Deal of Interest
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Figure 5.05 Formula for Calculating the Number of Households that will Join

*see Population Trends Analysis, page 18.

NOTE: Additional sources used in verifying the population data included DemographicsNow.com

Forecast of Households for a New YMCA Community Center Serving San Antonio's District 6

The following table calculates the number of households with *a great deal of interest* in joining a new YMCA Community Center serving San Antonio's District 6. The table below also illustrates the forecast of households with *a lot of interest* in joining—the second highest level of interest in joining. The rates quoted to respondents are outline in Figure 5.03 on page 29.

Pricing Option	Percentage of Households with A Great Deal of Interest in Joining = 4.0%	X	Total Number of Households	=	Forecast of Number of Households
Higher Current Branch Rates	0.5%	X	67,493	=	337
Higher Current Branch Rates PLUS Indoor Warm-Water Pool	0.3%	X	67,493	=	202
Lower Current Branch Rates	3.2%	X	67,493	=	2,160
Forecast of Households with A Great Deal of Interest in Joining a New YMCA Community Center Serving District 6					2,699
Forecast of Households with A Lot of Interest in Joining a New YMCA Community Center Serving District 6					7,154

Note: These forecasts do not take into account prospective new members who may terminate their memberships in the first year.

Figure 5.06 Forecast of Households for a New YMCA Community Center Serving District 6

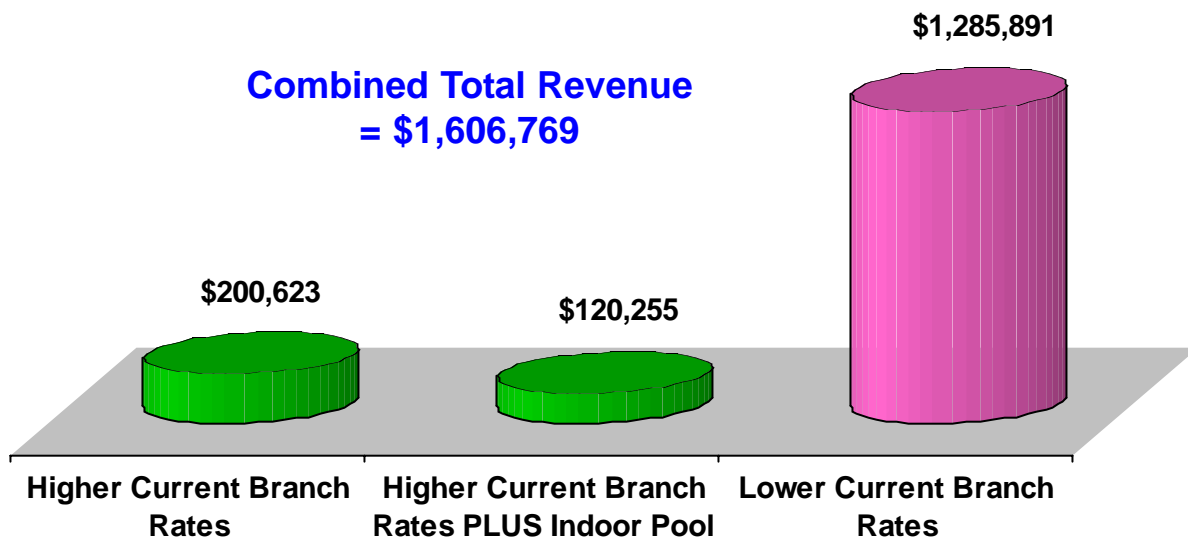


Forecast of Revenue Generated from Prospective Members

The following table (Figure 5.08) illustrates the formula used to forecast the annual revenue from memberships sold (not retained) at a new YMCA Community Center serving District 6 during the first 12–18 months of operation. Please note that the revenue forecasts in the graph below (Figure 5.09) do not include joining fees or revenue from program participation. As implementing the lower/current rates at the Westside YMCA is recommended by the Consultant, the graph illustrates the forecast of revenue generated from all prospective members captured but calculated at the lower, current branch rates.

Number of Households at Each Pricing Option	X	Percentage of Prospective Members Interested in a Membership Category	X	Annual Rate	=	Revenue Generated
forecast of households at each pricing option	X	1% Student Memberships	X	\$	=	\$
	X	5% Individual Adult Memberships	X	\$	=	\$
	X	10% Senior Memberships	X	\$	=	\$
	X	34% Adult Couple Memberships	X	\$	=	\$
	X	6% Single-Parent Memberships	X	\$	=	\$
	X	44% Family Memberships	X	\$	=	\$
Forecast of Annual Revenue Generated from Memberships Sold						\$

Figure 5.08 Formula for Calculating Annual Revenue



Note: Revenue loss from members terminating during their first year would need to be subtracted from this amount.

Figure 5.09 Forecast of Annual Revenue Generated from New Memberships Sold

Membership Projections Logic Model

The table below summarizes the findings of the market research study that forecasts the demand for a new YMCA Community Center serving District 6.

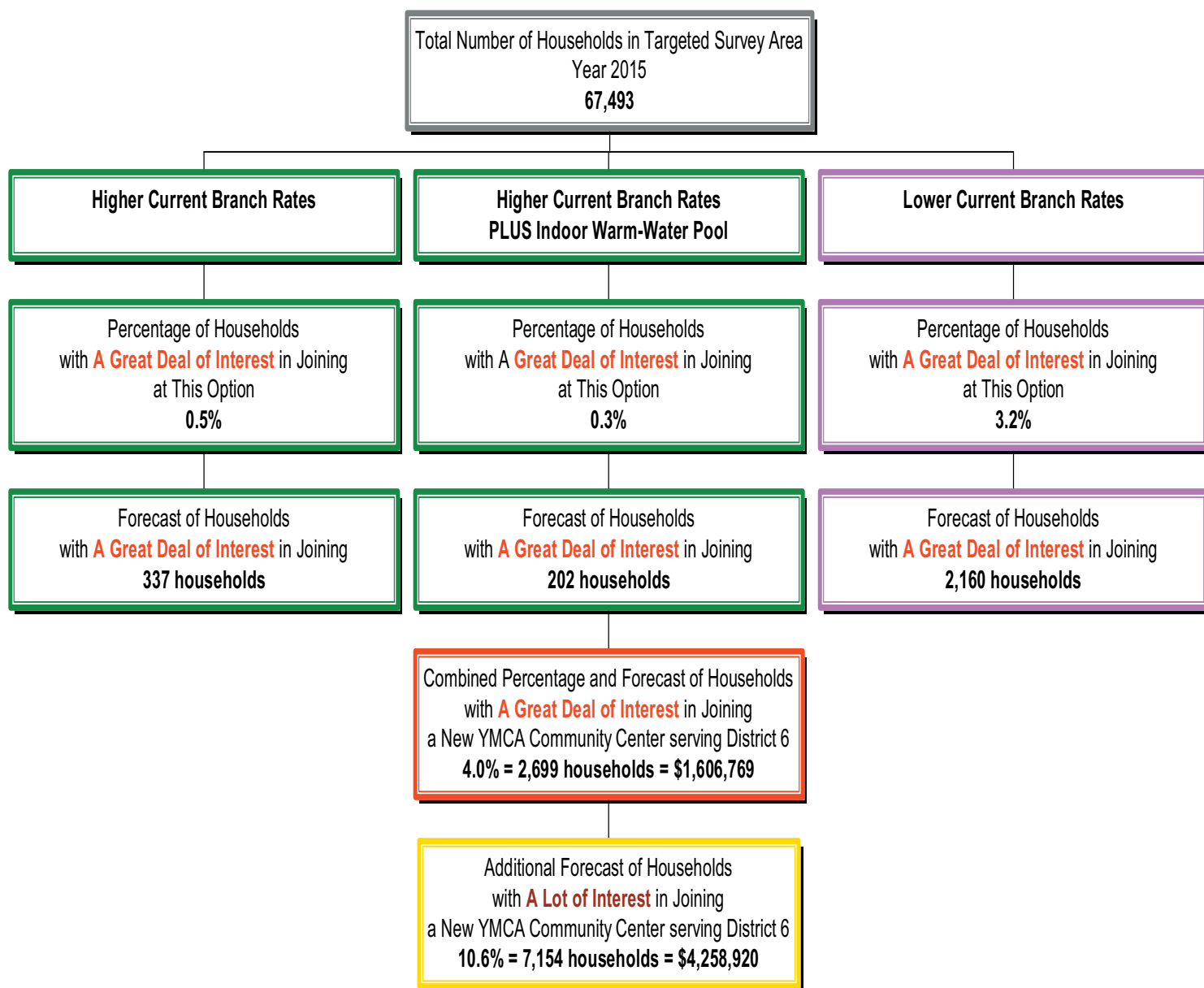


Figure 5.10 Membership Projections Logic Model

Reasons Area Residents Not Interested in Joining

The following table shows the reasons why area residents who are not currently involved with a YMCA are not interested in joining a new YMCA Community Center serving District 6.

Response Item	Percentage of Those Not Interested (Multiple Responses OK)
Lack of Interest/Personal Barriers	68%
Just not interested	38%
Wouldn't use	12%
No time	9%
Too old	6%
Health problems	3%
Satisfied with Current Affiliation/Situation	17%
Satisfied where I currently belong	12%
Own equipment/exercise at home	3%
Prefer outdoor activities	1%
Access at work/school	1%
Money-Related	11%
Costs too much/can't afford it	10%
Unemployed	1%
Location-Related	4%
Location not convenient	3%
Moving/visiting	1%

Figure 5.11 Reasons Area Residents Not Interested in Joining a New YMCA Community Center Serving District 6

Chapter 6

Profile of Prospective Members

This data can be used to

- Develop a marketing plan targeting specific member groups

Prospective members are area households with at least *a lot of interest* in joining a new YMCA Community Center Serving District 6.

Age of Prospective Members

The following table and graph show the **age** of adult prospective members and the general population.

Age	Prospective Members	General Population
Ages 18–19	—	2%
Ages 20–24	—	7%
Ages 25–34	18%	15%
Ages 35–44	26%	14%
Ages 45–54	27%	12%
Ages 55–64	24%	9%
Ages 65–74	5%	5%
Ages 75+	—	3%

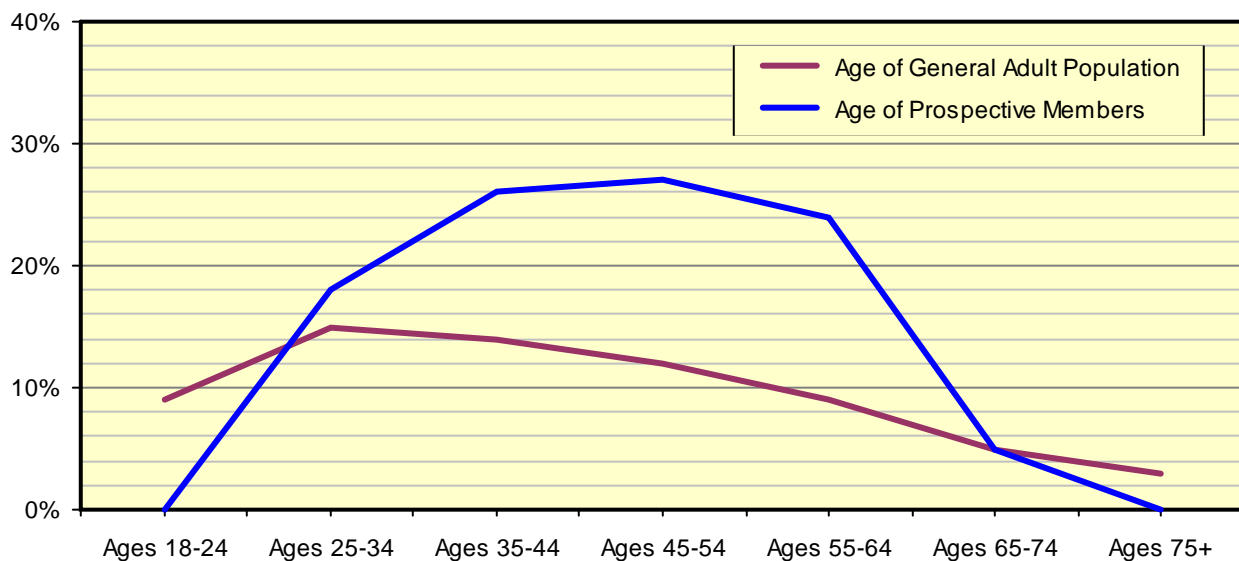


Figure 6.01 Age of Prospective Adult Members and the General Population

Ethnic Background of Prospective Members

The following chart shows the **ethnic background**

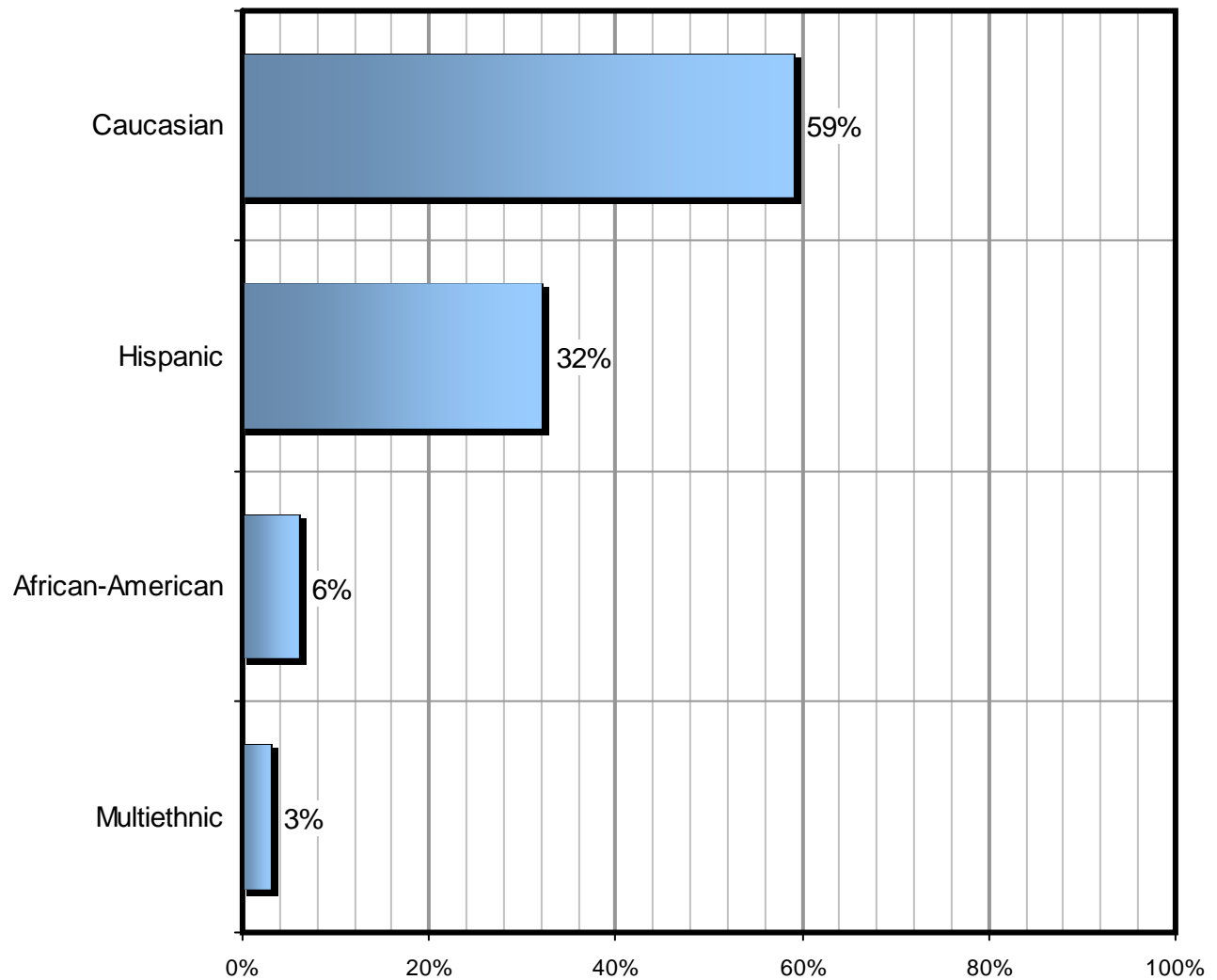
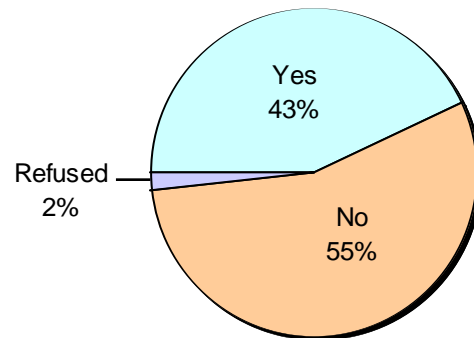


Figure 6.02 Ethnic Background of Prospective Members

Percentage of Prospective Members with Children in the Household

The chart to the right show the percentage of prospective members with **children under age 18 in their households**.

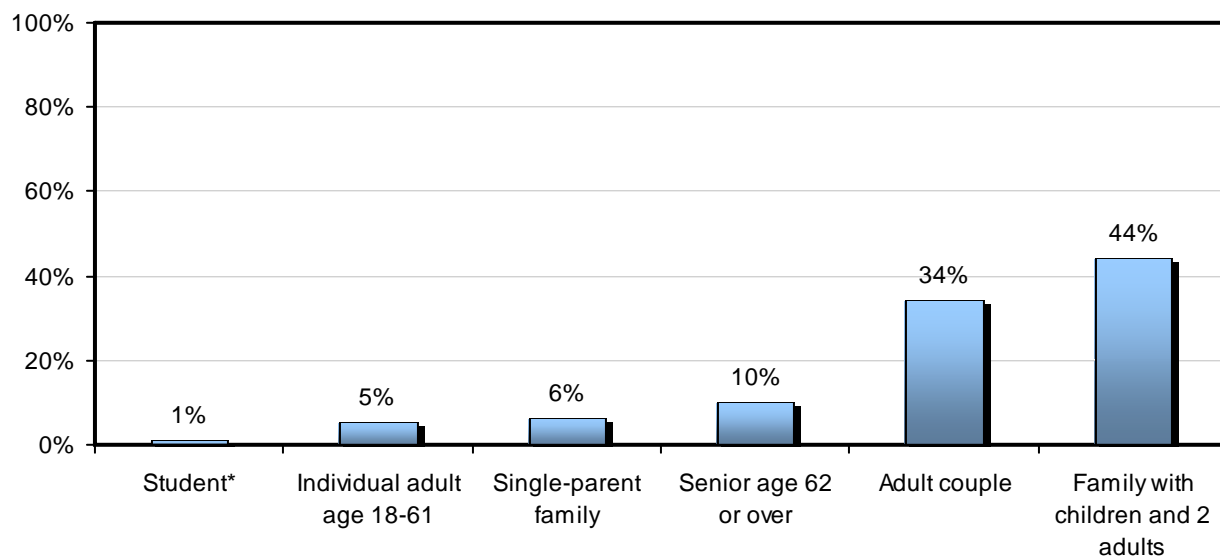


NOTE: Nationally, 34% of all households have children under age 18 in the household.

Figure 6.03 Prospective Members with Children Under Age 18 in Their Households

Membership Categories of Prospective Members

The following chart shows the **membership categories** preferred by **prospective members**.



* Someone under 18 years enrolled in college or a full-time college student over age 18.

Figure 6.04 Membership Categories of Prospective Members

Census Tract Locations of Prospective Members

The following map defines the **census tract locations** of resident prospective members.

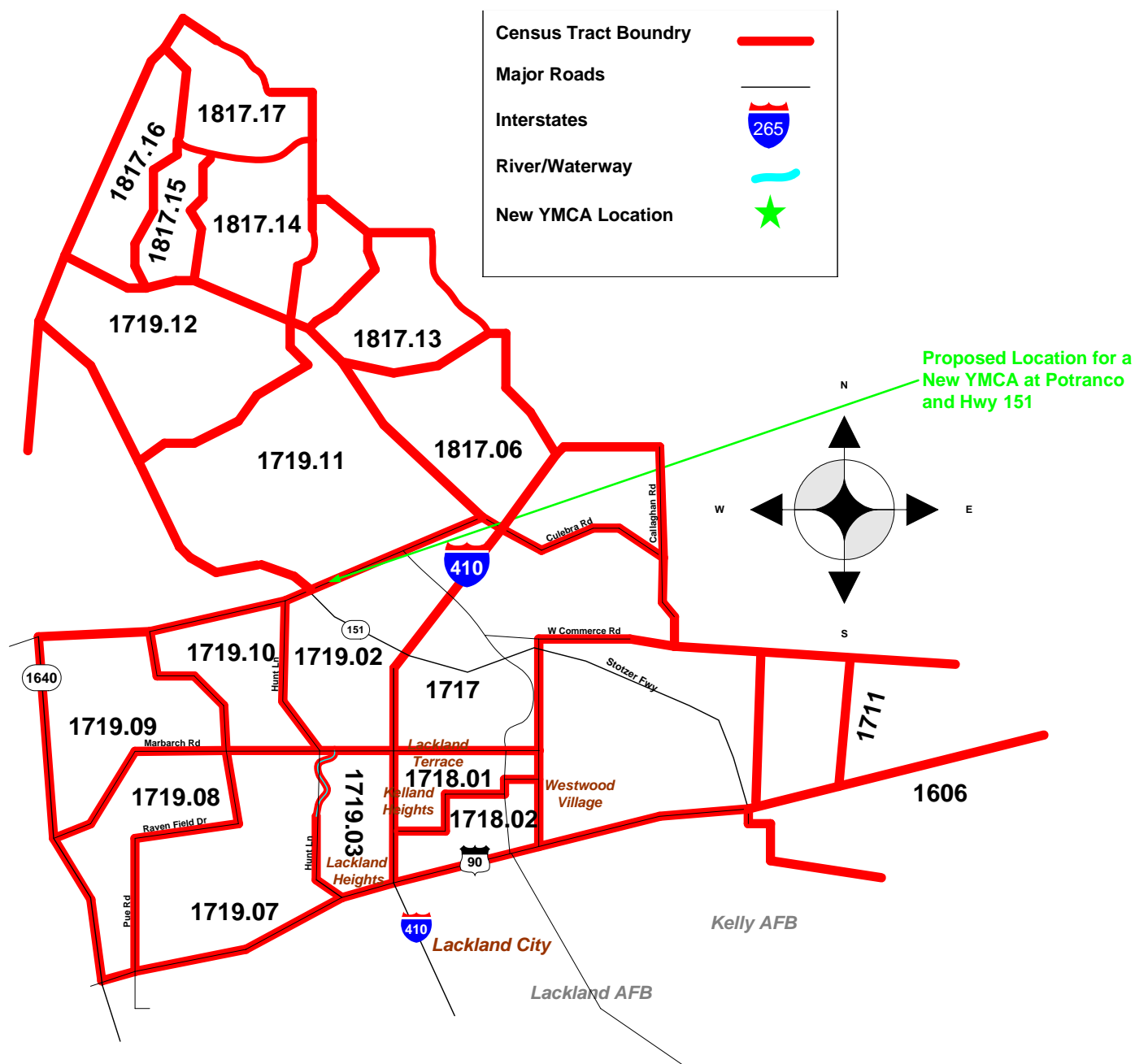


Figure 6.05 Census Tract Locations of Prospective Members

Health Statements of All Area Residents Compared to Prospective Members

The following chart shows how prospective members' responses compared to the responses of all area residents **to the three statements given, indicating the presence of "health seekers"**.

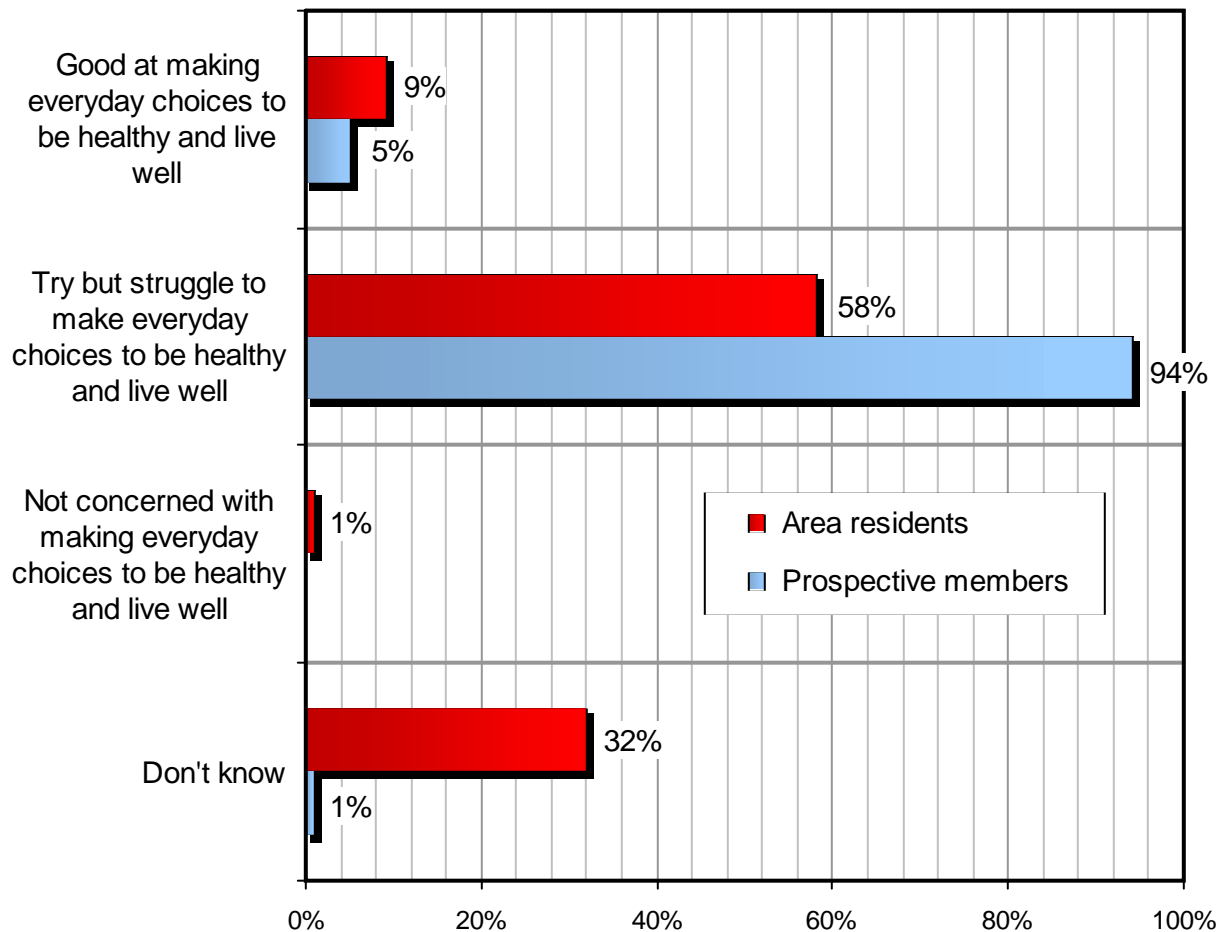


Figure 6.06 How Prospective Members and All Area Residents Evaluated their Health and Wellness Choices

Level of Interest in Lower Rates or Additional Features among Prospective Members

The following charts show the level of interest in either **lower rates or additional features** among prospective members. The chart to the left shows the percentage of prospective members who said they would be interested in either lower rates or additional features. The chart to the right shows which they would prefer.

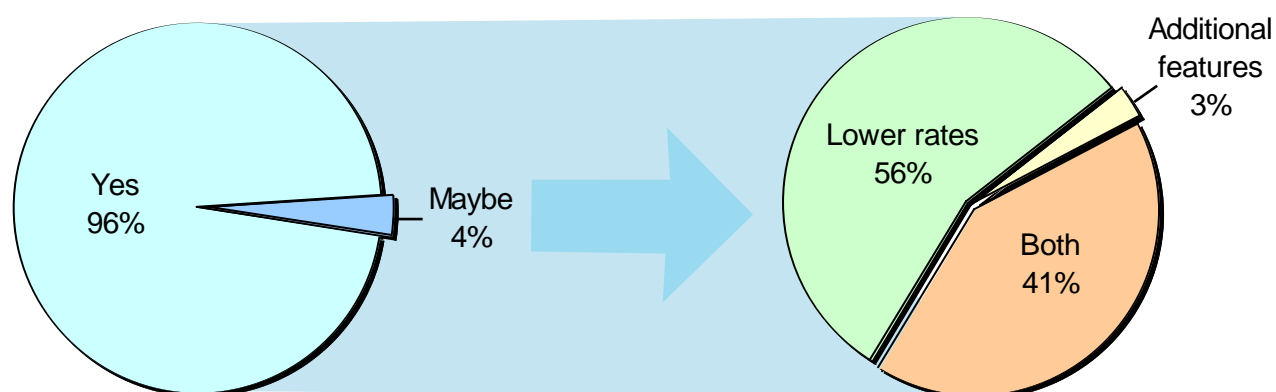


Figure 6.07 Level of Interest in Lower Rates or Additional Features among Prospective Members

Chapter 7

Interest in Children's and Family Programs

This data can be used to

- Prioritize program offerings
- Understand the size of each program
- Plan facility features based on program interest

Interest in Babysitting, Child Care, After-School, or Child Development Programs among Prospective Members

The following table shows the level of interest in **child care, after-school, or child development programs** among prospective members with children ages infant–13 in the household.

Baby-sitting, child care, after-school, or child development programs*	Infant–2	3–5	6–9	10–13
Baby-sitting while parents work out	Moderate	Very High		
A kids' gym with supervised features such as moon-walks and a climbing maze while parents work out		Very High	Very High	Low
Arts programs with crafts, plays, story time and movement activities		High	Moderate	
Parents' Night Out fun program for children at \$25/child		Low	Low	Very Low
Full-day care on school holidays at the Y at \$25/day		Low	Very Low	Very Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

*Twice-a-week fun and sports club at \$10/day and Licensed after-school programs 5 days/week at the school for \$90/week were also tested and received insignificant interest.

Figure 7.01 Interest in Babysitting, Child Care, After-school, and Child Development Programs among Prospective Members

Interest in Summer Day Camps among Prospective Members

The following table shows the level of interest in different activities for **summer day camps** at an average cost of **\$110/week** among prospective members with children under 18 in the household.

Summer day camps		3–5	6–9	10–13	14–17
Traditional summer day camp with swimming, games, and arts and crafts		High	High	Moderate	
Full-day sports camp		Low	Moderate	Low	Low
Sports camps	T-ball/baseball/softball	Low	Low	Very Low	Very Low
	Basketball		Low	Low	Low
	Flag football		Low	Very Low	Very Low
	Outdoor soccer		Very Low	Low	Low
	Tennis		Very Low	Very Low	Low
	Volleyball		Very Low	Very Low	Low
Creative arts camp with drawing, drama, and music		Low	Low	Low	

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

When those prospective members who answered *maybe*, *don't know*, or *no* to summer day camps were asked if they would be interested if the cost was \$88/week, 7% answered yes and 12% answered *maybe*.

Figure 7.02 Interest in Summer Day Camps among Prospective Members

Interest in Sports and Recreation Programs for Children and Teenagers among Prospective Members

The following table shows the level of interest among prospective members with children in **sports and recreation programs** at an average of \$70/8 weeks for children and teenagers.

Sports and recreation programs	3–5	6–9	10–13	14–17
Creative arts courses such as drawing, drama, and music	Moderate	Low	Very Low	
Video game-based cardio workout features such as Dance Dance Revolution and Sports walls		Moderate	Low	Low
Conditioning program for sports			Moderate	Low
Using an indoor Climbing wall			Low	Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

When those prospective members who answered *maybe*, *don't know*, or *no* to sports and recreation programs were asked if they would be interested if the cost was \$56/week, 5% answered *yes* and 12% answered *maybe*.

Figure 7.03 Interest in Sports and Recreation Programs for Children and Teenagers among Prospective Members

Interest in Sports Leagues for Children and Teenagers among Prospective Members

The following table shows the level of interest in **sports leagues*** for children and teens at \$65/8 weeks.

Sports leagues	3–5	6–9	10–13	14–17
Indoor sports leagues				
Basketball	Low	Moderate	Low	Low
Soccer	Low	Very Low	Very Low	Very Low
Volleyball	Low	Very Low	Very Low	Very Low
Outdoor sports leagues				
Soccer	Low	Low	Low	Low
Flag Football	Low	Very Low	Very Low	Very Low
T-ball	Low	Very Low	Very Low	Very Low
Baseball	Very Low	Low	Very Low	Very Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

*All other sports leagues received insignificant interest.

Figure 7.04 Interest in Sports Leagues for Children and Teenagers among Prospective Members

Interest in Social, Recreational and Fitness Activities for Older Children and Teenagers among Prospective Members

The following table shows the level of interest in **social, recreational and fitness activities** for older children and teenagers among prospective members with children ages 10–17.

Social and recreational activities for teens	10–13	14–17
A teen fitness center where teens learn weight training techniques	Moderate	Moderate
Creative classes like hip hop, break dancing, and dee-jaying	Moderate	Low
A radio station on the internet run by teens	Moderate	Low
Youth Obesity prevention program with exercise, nutrition, and lifestyle coaching	Moderate	Low
A teen lounge with TV and pool tables	Low	Moderate
Teen nights with movies, food, and dancing	Low	Low
Stage for theater and bands	Low	Low
Yoga and kickboxing	Low	Low
Educational programs such as computer training, job training or mentoring programs such as Y Achievers	Low	Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

Figure 7.05 Interest in Social, Recreational, and Fitness Activities for Older Children and Teenagers among Prospective Members

Interest in Activities Parents and Children Can Do Together among Prospective Members

The following chart shows the level of interest in **recreation activities that parents and children can do together** such as Family Fun Night at the Y and family wellness programs where parents and child can exercise at the same time among prospective members with children under age 18 in their households.

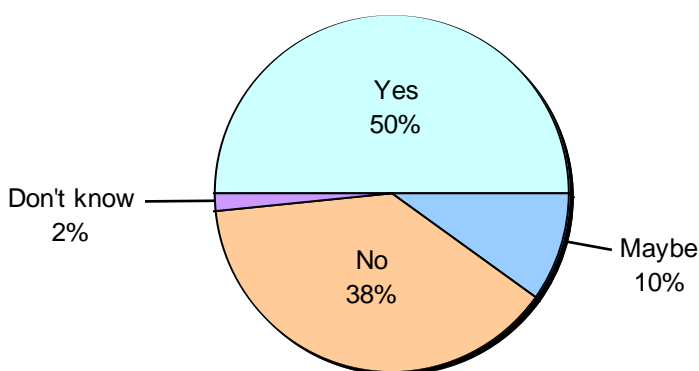


Figure 7.06 Interest in Activities Parents and Children Can Do Together

Chapter 8

Interest in Programs for Adults

Note: When percentages are presented in graphs on the following pages, the percentages represent the number of membership units that expressed an interest in this activity. (e.g., 10% = 10% x 2,699 units = 270 units)

Interest in Fitness Activities for Adults

The following graph shows the level of interest in **fitness activities** for adults among prospective members.

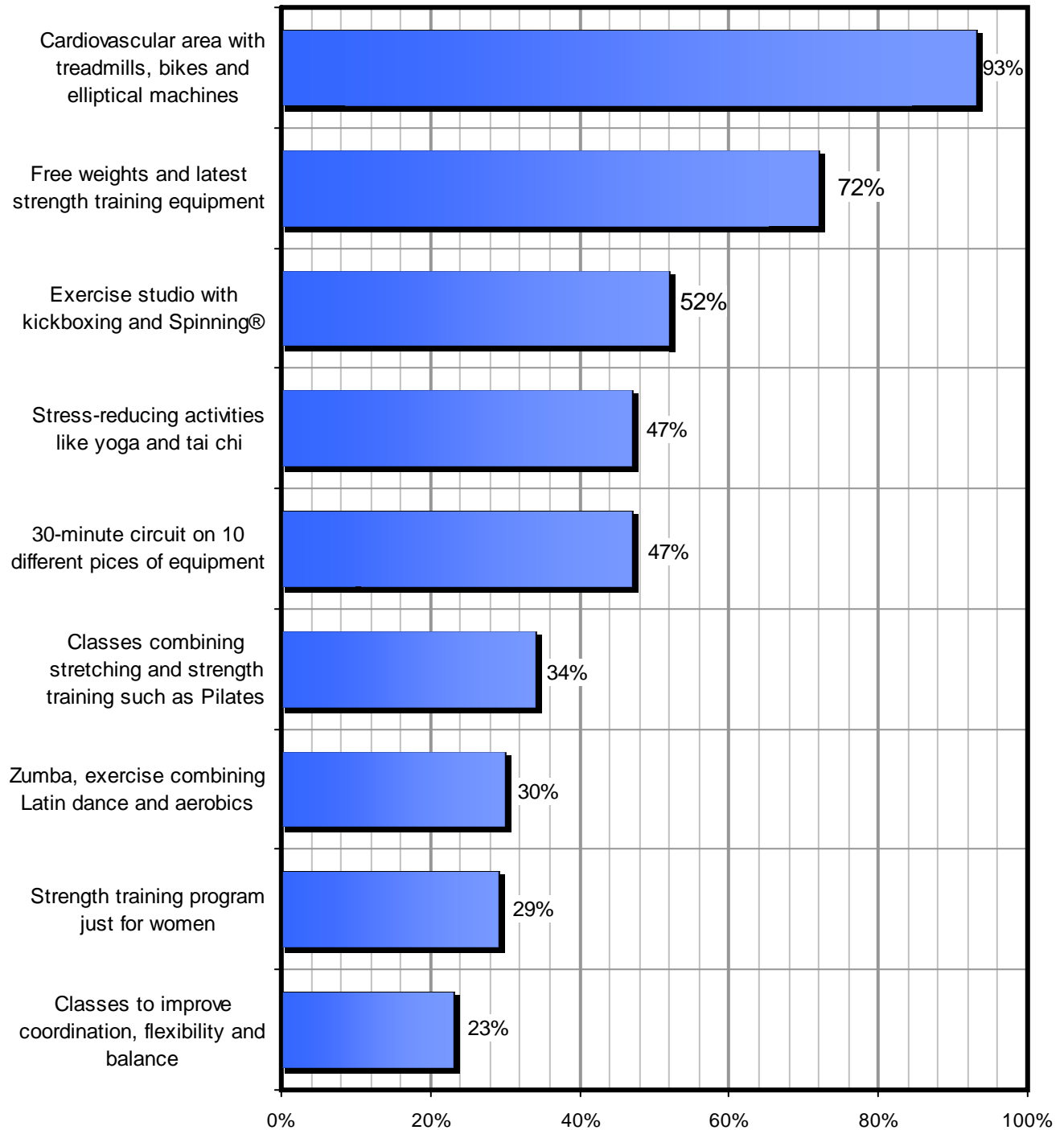
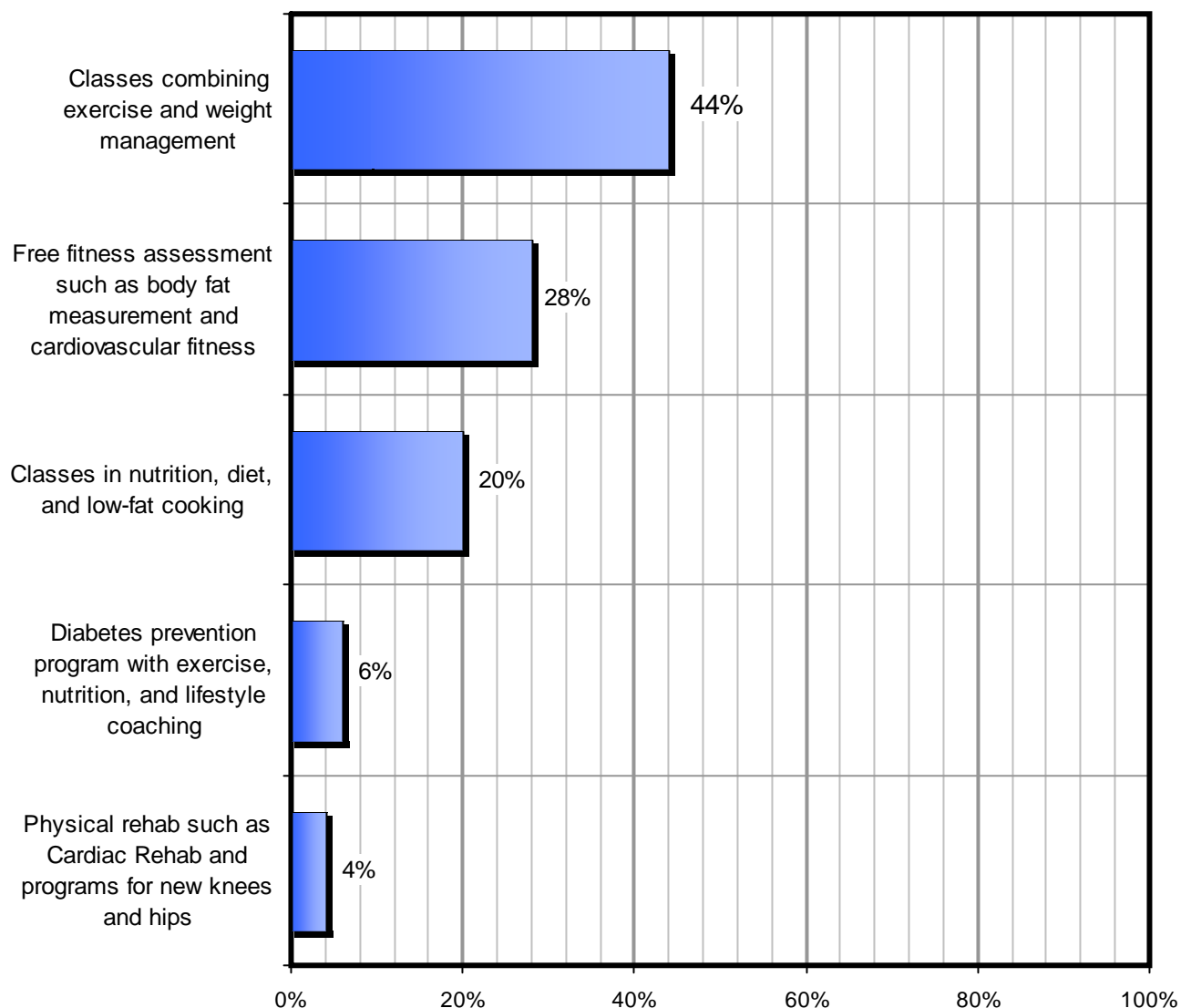


Figure 8.01 Prospective Members' Interest in Fitness Activities for Adults

Interest in Health and Wellness Programs for Adults among Prospective Members

The following graph shows prospective members' interest in **health and wellness programs*** for adults that could be offered in partnership with a hospital.

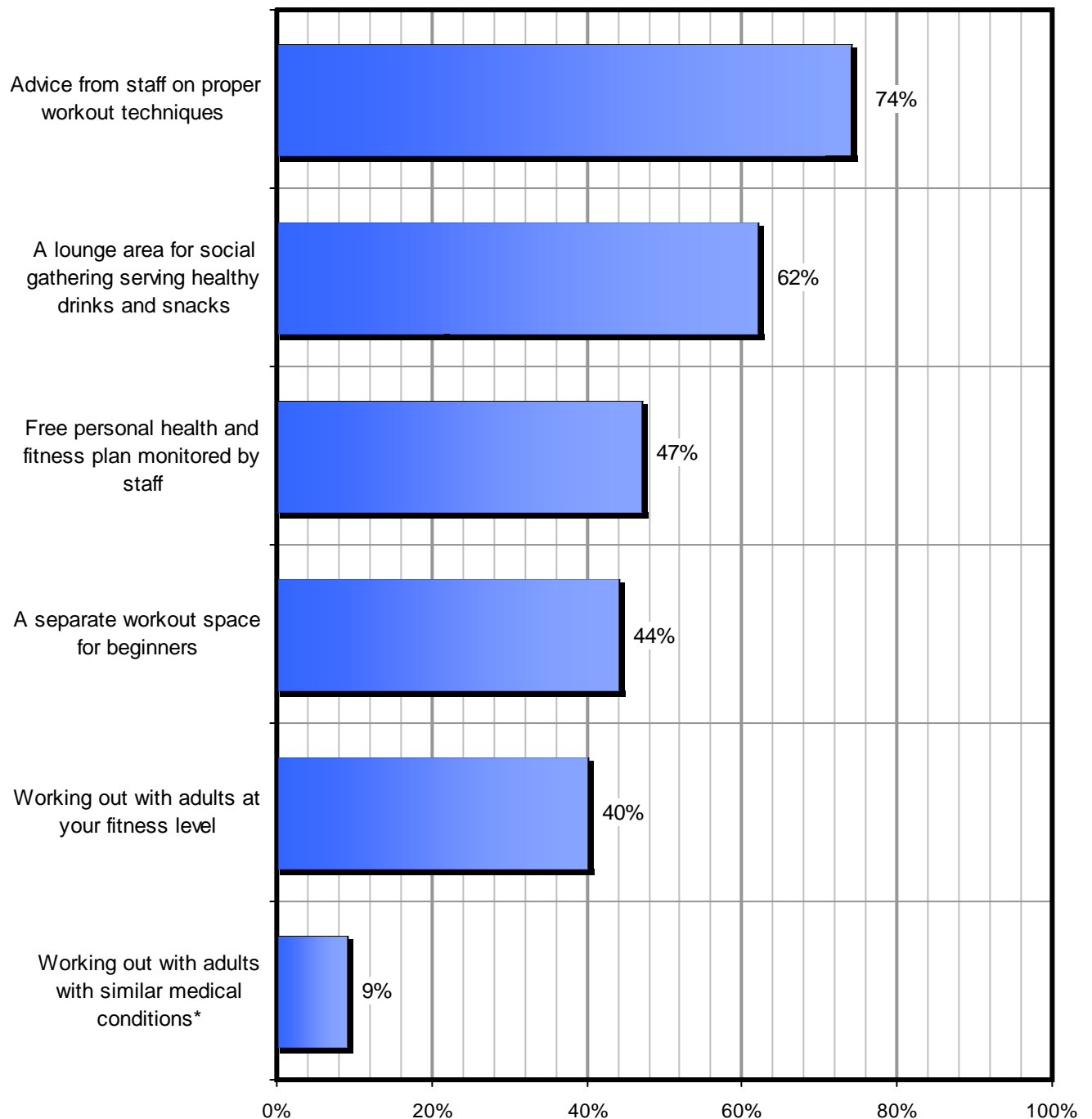


* Exercise program for cancer survivors to reduce stress and regain strength and energy was also tested and received insignificant interest.

Figure 8.02 Prospective Members' Interest in Health and Wellness Programs for Adults

How Prospective Members Want to be Served

The following graph shows how prospective members said they **want to be served**.



*Arthritis (40%) and heart condition (7%) were cited.

Figure 8.03 How Prospective Members Want to be Served

Interest in Sports and Recreation Programs for Adults among Prospective Members

The following graph shows the level of interest in **sports and recreation programs** for adults among prospective members.

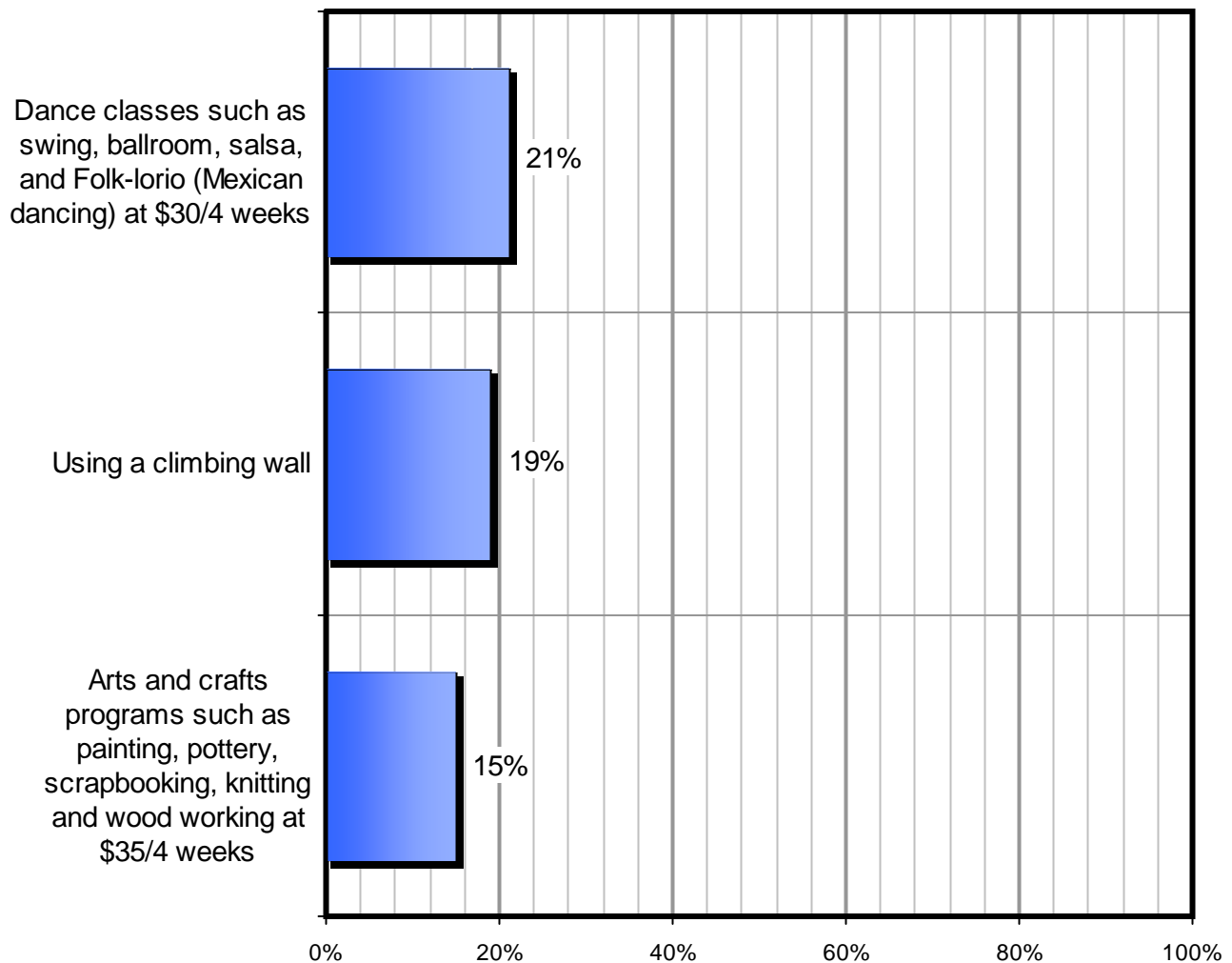


Figure 8.04 Interest in Sports and Recreation Programs for Adults among Prospective Members

Chapter 9

Interest in Aquatics for Children and Adults

Interest in Aquatic Programs for Children and Teens among Prospective Members

The following table shows the level of interest in **aquatic programs for children and teens** among prospective members.

Activities in the pool*	Infant –2	3–5	6–9	10–13	14–17
Parent and infant swim classes at about \$65 for an 8-week session	Moderate				
Recreational swimming in a splash pad with water sprays and fountains		Very High	Very High	High	High
Swim lessons at about \$65/8-week session		High	Low	Very Low	Very Low
Swim teams at \$150 for a season (3 months)			Low	Very Low	Very Low
Lifeguard training at \$150/8 weeks					Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

* Supervised sports such as water volleyball at about \$65 for an 8-week session was also tested and received insignificant interest.

Figure 9.01 Interest in Aquatic Programs for Children and Teens among Prospective Members

Interest in Aquatic Programs for Adults

The following graph shows interest in **activities in a pool*** among prospective adult members.

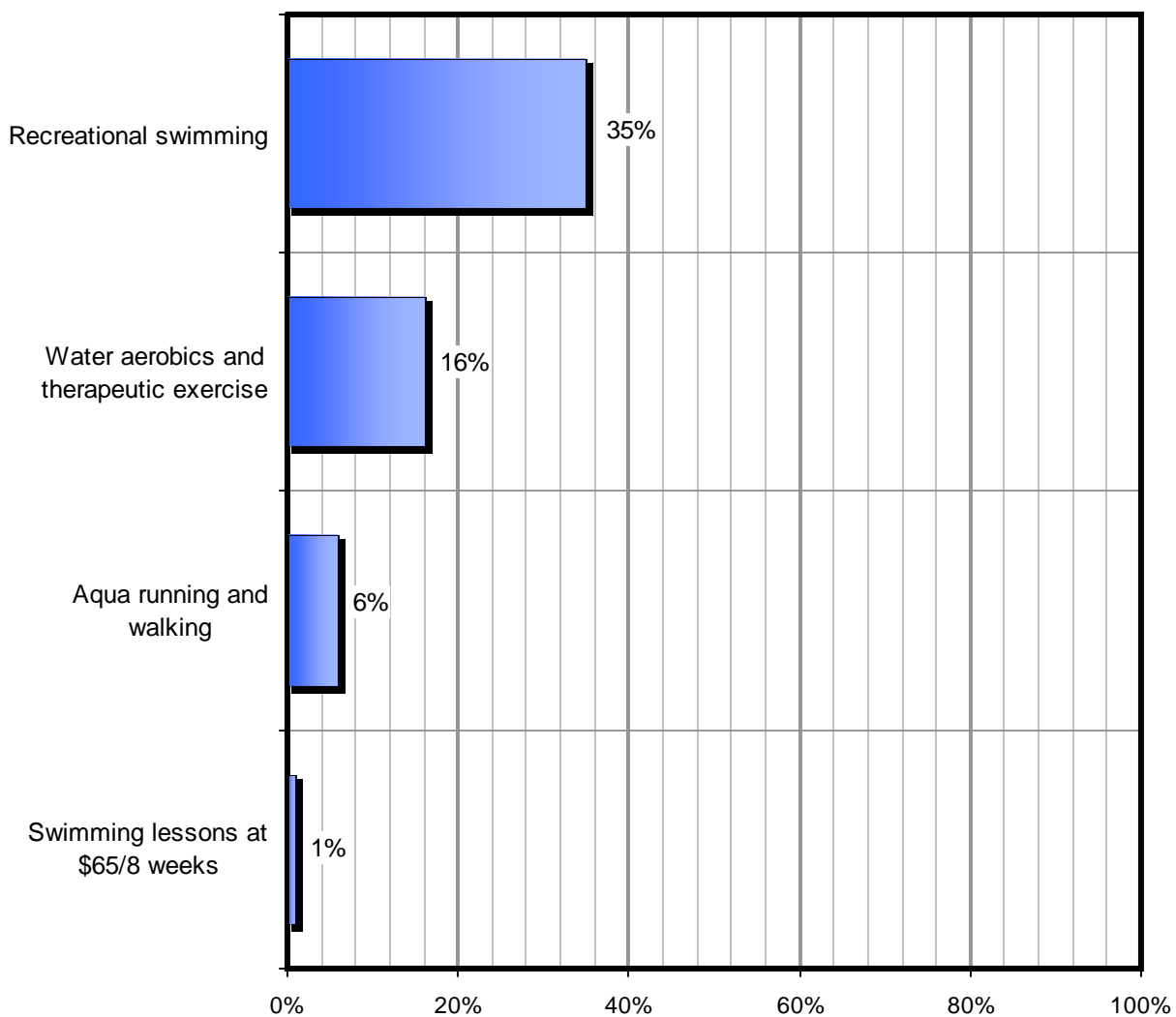


Figure 9.02 Interest in Aquatic Programs for Adults among Prospective Members

Chapter 10

Strategic Questions and Answers

Strategic Questions and Answers for a New YMCA Community Center Serving District 6 of the City of San Antonio

The Consultant recommends that in order to meet the forecasts for new membership units, the leaders of the YMCA of Greater San Antonio, Texas along with the City of San Antonio should carefully consider the answers to all of the following questions:

1. Does interest exist for a new YMCA community center serving District 6 of the City of San Antonio?
2. Does the proposed location at Potranco and Highway 151 work?
3. Does the study reveal other characteristics of the community that are critical to the success of a new YMCA community center serving District 6 of the City of San Antonio?
4. Are there factors that could increase or decrease the forecasts of new membership units?
6. What role does pricing play in the success of a new YMCA community center serving District 6 of the City of San Antonio?
7. Who are prospective members of a new YMCA community center serving District 6 of the City of San Antonio?
8. Are there recommendations on the facility development of a new YMCA community center serving District 6 of the City of San Antonio?

1. Does interest exist for a new YMCA community center serving District 6 of the City of San Antonio?

Yes, a significant number of households with a great deal of interest and a huge number of households “waiting-in-the-wings”

Findings revealed **moderate interest** for a new YMCA community center serving District 6 of the City of San Antonio. As illustrated in Figure 5.06 and Figure 5.10, page 31 & 34, of all households that currently do not belong to a YMCA in the area targeted for the study, a total of **4.0%** of all households, or **2,699 households** had *a great deal of interest* in joining a new YMCA at the proposed location. *A great deal of interest* is the highest level on the intensity interest scale of 0 to 4, where 0 means *zero interest* and 4 means *a great deal of interest*.

Moreover, another 10.6% had *a lot of interest* in joining a new YMCA community center, which translates into another 7,154 households. Please note that the Consultant typically bases forecasts only on those with *a great deal of interest*.

Historically the number of households with *a lot of interest* in joining is an indicator for how fast a new YMCA can reach the forecast within 12–18 months of its opening, how likely a new YMCA is to maintain the membership level after the first 12–18 months, and how likely a new YMCA could exceed the forecast. Based on the Consultant’s experience, the ideal ratio between the two levels is 1:1.

In this case, the ratio between the two levels is close to 1:3, which suggests great potential for the new YMCA to reach and exceed the forecasts made in this study.

The hesitation among households with *a lot of interest* in joining is common when the proposed facility doesn't exist yet and when the location is in an area where the name of the YMCA and its programs are largely unknown. With aggressive promotions that highlight the uniqueness of the YMCA, and building on the YMCA's reputation in the greater San Antonio area, a new YMCA community center in District 6 should be able to capture a portion of these households with the second highest level of interest in joining.

Please note these numbers forecasted represent memberships sold, not retained, during the first 12–18 months after the new facility is built and recommendations in the report are followed. It includes all facility and pricing options tested in the study, but does not exclude prospective members who may terminate their memberships. It therefore should not be interpreted to mean that a YMCA will definitely have and maintain a certain number of members.

2. Does the proposed location at the corner of Potranco and Highway 151 work?

Yes

As illustrated in Figure 5.01, page 27, the vast majority of prospective members (86%) said they considered the proposed location at the corner of Potranco and Highway 151 *very convenient*. This bodes very well for this location for a new YMCA community center.

3. Does the study reveal other characteristics of the community that are critical to the success of a new YMCA community center serving District 6?

Yes

The study also revealed the following characteristics of households in the survey area that are important for the success of a new YMCA community center serving District 6:

- The general population is **largely physically inactive and very ill-equipped with knowledge of healthy living**. Half of households indicated they currently engaged in any type of physical activity, which is drastically lower than the national average of 55%. Less than one in ten (9%) choose the statement *I am good at every day choices to be healthy and live well*, the rest are either struggling to do so or don't know. Motivating and serving a relatively inactive and ill-equipped population requires more dedicated efforts.
- **Lack of providers in the community, especially in the public sector**. Less than one in five (19%) of households said they already belong to or participate in some type of nonprofit or for-profit fitness, recreation, sports club or facility, a level much lower than the national average of 25%.

Six names of for-profit providers were mentioned, they are serving only a total of 9% of all households, which is just above the national average of 8%. In comparison, only 3% of households currently use area parks and recreational facilities, a level much lower than the national average of 8%. These findings suggest a **huge void in health, wellness and recreation services providers** in the community.

- The **population growth in the area is very strong**. The projected growth in the area for the next five years is 12%, quadruple the national average of 3%. This means the YMCA will have many new families moving in every year. Therefore an **on-going marketing and promotion** campaign would be critical to keep the YMCA name in people's minds.
- The **awareness of the YMCA name is just above-average**. As indicated in graphs on page 24, 26% of all area households said they were aware of any YMCAs in or near their community, which is just above the national average of 25%. To ensure the success of the new YMCA community center, an aggressive marketing and promotion campaign should be in place to educate people about the YMCA and raise awareness before the new facility is open.

4. Are there factors that could increase or decrease the forecasts of new membership units?

Yes

The table below provides insight on additional factors that could increase or decrease the forecasts of new membership units for a new YMCA community center serving District 6.

Forecast Could Increase If...
<ul style="list-style-type: none"> • a new YMCA community center is able to attract a significant portion of those households with <i>a lot of interest</i> in joining with aggressive marketing and promotion of its income-based membership rates. • no other major provider of similar services enters the marketplace and the new YMCA community center is able to be the area's leading provider for fitness, wellness, aquatics, and recreation. • partnerships are sought with other organizations that can broaden the program offerings and services such as city parks and recreation department for outdoor sports, schools for before- and after-school programs and teen programs.
Forecast Could Decrease If...
<ul style="list-style-type: none"> • there are similar service providers that capture the Family with children, aging baby-boomers, and Health-seeker prospective members before the YMCA community center does. • programming and marketing efforts are generic and fail to capture the demographic and psychographic characteristics of prospective members. • the most popular programs and activities indicated by this report are not included.

Figure 10.01 Factors that Could Increase or Decrease Forecasts of New Membership Units

5. What role does pricing play in the success of a new YMCA community center serving District 6?

A big one

Two membership rates were tested, the findings revealed great price sensitivity among prospective members. The majority (80%) indicated *a great deal of interest* in joining at the lower, current branch-only rates at the Westside YMCA and only 20% expressed interest at the higher, current branch rates at the Braundera YMCA.

This means the current rates at the Westside YMCA will work best in attracting the maximum number of households, maximizing its membership revenue potential. and better serving the community by providing quality facility and services.

6. Who are the prospective members of a new YMCA community center serving District 6?

Families with children, aging baby-boomers, and Health-seeker, many desire for a “Third Place”

Consider the following demographics of prospective members of the new YMCA community center:

- More than four in 10 prospective members (43%) said they had children under age 18 in their homes. This is also much more than the 33% with children in the general community. This means that the new YMCA community center would serve disproportionately more **families with children**. This finding dictates the necessity of providing services such as baby-sitting while parents work out, a kids’ play center for older kids, and family changing rooms, all of which would enable family members to use the facility with convenience and ease, and were of moderate to high interest among prospective members.
- More than half (51%) of prospective members identified themselves as ages 45–64, representing baby-boomers. More than one-third (34%) of prospective members would join as adult couples. These findings suggest the presence of a lot of empty-nesters.
- Nearly all prospective members (94%) said they tried to make everyday choices to be healthy and live well, but struggle to do so, which is typical of Health-seekers. As a result 74% expressed interest in having Y staff offer them advice on proper workout techniques, 47% in a free personal health and fitness plan based on their goals and monitored by Y staff, and 62% in a lounge area that serves healthy snacks and coffee. The strong interest in a lounge area signified the importance of social infrastructure at the new YMCA and strong desire for the “Third Place” among prospective members. The “Third Place” refers to social surroundings separate from the two usual social environments of home and the workplace.

A new YMCA community center serving District 6 should design its facility, programming mix, marketing and promotional strategies with these demographics and psychographics in mind.

7. Are there recommendations on the facility development of a new YMCA community center serving District 6?

Yes

If the decision is made to proceed with building a new YMCA community center at the corner of Potranco and Highway 151 serving residents in District 6 of the City of San Antonio, the Consultant recommends a facility of approximately 37,000 square feet indoors including an indoor pool.

The Consultant applies two important criteria when recommending and prioritizing the features: **member usage per square foot** and **revenue generated per square foot per capital dollar invested**. However, FourSquare Research, Inc. is not an architectural or design firm. Our opinions are based on our experience with over 700 similar non-profit studies and on observing over 1,000 for-profit fitness providers. Actual square footage and costs will vary widely depending on zoning and environmental issues. All recommendations are meant to provide a “ball park” guide for facility development, expansion, and/or renovation.

The tables on the following pages first show the **program usage** of major features among prospective members, then lists **space allocation** recommended for a new YMCA community center at the corner of Potranco and Highway 151.

Features of a New YMCA Community Center Serving District 6 of the City of San Antonio								
Programs	Fitness Center	Aerobics Studios	Multipurpose Rooms	Indoor Multi-purpose Gymnasium	Indoor Warm-Water Family Pool	Child Watch/ Babysitting	Kids Zone	Youth/ Teen Center
Adult Fitness	Very High	Very High			Moderate			
Adult Aquatics					High			
Adult Adventure								
Adult Sports								
Adult Recreation		Moderate						
Nutrition and Weight Management			High					
Stress and Relaxation		Very High						
Health Programs			Moderate					
Women's Programs	Moderate							
Family Activities				High	High			
Programs for Children Ages 0–2					Moderate	Moderate		
Programs for Children Ages 3–5		Low	High	Low	Very High	Very High	Very High	
Programs for Children Ages 6–9		Low	Moderate	Low	Very High		Very High	
Programs for Children Ages 10–13	Moderate	Low	Low	Low	High		Low	Low
Programs for Children Ages 14–17	Moderate	Low	Low	Low	High			Moderate
Adult Rating Scale	Low	<15%		Children's Rating Scale				
	Moderate	15%–29%				Low	Moderate	<5%
	High	30%–44%					High	5%–9%
	Very High	45%+					Very High	10%–14%
								15%+

Figure 10.02 Summary of Usage among Prospective Members of a New YMCA Community Center Serving District 6

Indoor Features Critical in Attracting New Membership Units for a New YMCA Community Center Serving District 6 of the City of San Antonio	Approximate Square Footage	Program Interest Findings
First-class wellness center that includes <ul style="list-style-type: none"> • a cardiovascular area of 4,000 sq. ft. • a free weights and strength-training equipment area of 2,500 sq. ft., including a 30-minute circuit training area • a designated workout area of 250 sq. ft. with more staff supervision for teens, beginners, and women • consulting areas/rooms of 250 sq. ft 	7,000	Figure 7.05, Figure 8.01, Figure 8.03, & Figure 8.04
Two group exercise studios, one 1,500 square feet for aerobics, group fitness classes, and another 1,500 square feet for relaxation, dance, yoga, and tai chi	3,000	Figure 8.02, & Figure 8.04
An indoor warm-water family pool with <ul style="list-style-type: none"> • zero degree/beach entry for recreational swimming, lessons, and water aerobics • aquatic playground features such as splash pads and sprays • two lanes for lap swimming, aqua walking and running • showers, lockers, and changing areas for men, women, and families 	9,000	Figure 7.02, Figure 9.01, & Figure 9.02,
An indoor multipurpose activity center/gymnasium with half courts, dividers, retractable hoops, versatile flooring, and ample storage space for a variety of activities such as basketball, volleyball, gymnastics, summer day camps, and family night.	6,000	Figure 7.02, & Figure 8.04
Multipurpose classrooms, with dividers and a sink/wet area for arts classes, health programs, nutrition seminars, and weight loss programs	500	Figure 7.01, Figure 7.02, Figure 8.02, & Figure 8.04
Child watch/baby-sitting area for children infant–5	1,000	Figure 7.01
A kids play center with high ceiling, moonwalks, climbing mazes and interactive games for children ages 6–9	1,000	Figure 7.01, & Figure 7.02
Youth and teen center with TV, pool tables, Exergame, and seating for social (which can also be used for other programs when needed)	800	Figure 7.05
Members' lounge/snack bar/social area/community program area	1,500	Figure 8.03
Subtotal	29,800	
Minimal planning factor, H/V/AC, bathrooms, halls, and offices (25%)	7,450	
Total Indoor	37,250	

Figure 10.03 Indoor Features Critical to the Success of a New YMCA Community Center Serving District 6

